

Staffpoint™ Personnel Panel 3.0 User Manual

Get to know the Personnel control panel and revolutionize the way you work your assignments!

The screenshot displays the Staffpoint Personnel Panel 3.0 interface. At the top, there is a header with the Staffpoint logo on the left and a group of diverse professionals on the right. Below the header, a navigation bar contains links: "Open Assignments", "My Assignments", "Reports", "My Details", "Availability", and "Logout". The main content area is titled "Open Assignments" and shows a calendar for the period "07/03/2013 - 21/03/2013". The calendar view shows days of the week and dates. Assignments are represented by red blocks with time slots and labels. For example, on Sunday 10 March 13, there are two assignments: "07:00 - 12:00 123 123 Ca..." and "12:00 - 09:00 123 123 Ca...". On Tuesday 12 March 13, there are three assignments: "07:00 - 09:00 XYZ Packaging", "07:00 - 09:00 123 123 Ca...", and "09:00 - 15:00 123 123 Ca...". On Wednesday 13 March 13, there are five assignments: "07:00 - 11:00 123 123 Ca...", "07:00 - 14:00 123 123 Ca...", "07:00 - 15:00 123 123 Ca...", "07:00 - 13:00 123 123 Ca...", and "14:00 - 22:00 123 123 Ca...". The interface also includes a "Calendar View" button and a "List View" button.

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Chapter 1

Welcome to the Staffpoint™ Personnel Panel

Introducing the Staffpoint™ Personnel access panel

As a valued personnel member, your staffing agency or head office has provided you free access to their new Staffpoint™ personnel scheduling system. This manual will show you how quick and easy it is to use the free Personnel Interface Module as well as the incredible benefits that this will provide for you.

The system is web based, so you can follow Staffpoint™ from anywhere you have internet access. The personnel interface allows you to quickly and easily check up on assignment requests to your agency, and to see the status of those requests in real time, anytime.

Whenever your agency gets a new assignment request that you're qualified to work, it optionally creates a red tag on your Open Assignments page. If your agency assigns you the assignment, it will turn into a blue tag that you can see on your "My Assignments" status page. Even if you're not logged into Staffpoint™, you'll still get an email or phone call through the Staffpoint™ system as set-up between you and your agency.

Staffpoint™ allows you to request assignments that you'd like assigned to you. By clicking on a red open assignment tag, you can instantly 'request' that assignment, which turns the tag yellow on both yours and your Agency's assignment overview. This puts your name at the top of the selection list for consideration. If you're selected the tag will turn blue and appear on your "my assignments" page. You'll be notified instantly and be given a 24 hour reminder. Optionally, depending on the Staffpoint version, you can book yourself directly to an assignment in the same way.

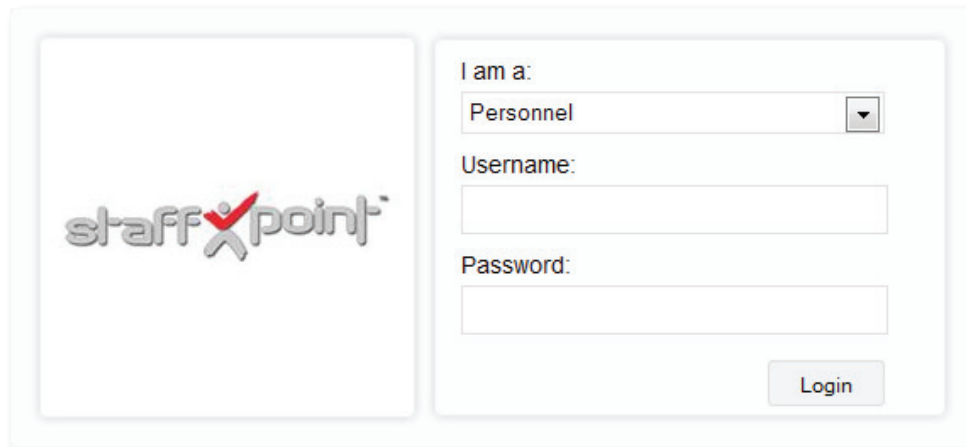
Best of all, Staffpoint™ really allows you the personnel to take control of your own schedule. You can set your own availability with easy to use drag and drop calendars. Keeping track of your assignments with your agency couldn't be easier.

By using Staffpoint™, your staffing agency has shown how much they care about you and that they recognize just how valuable you are. They've chosen Staffpoint™ for their scheduling system because it allows them to take better care of your needs and to communicate with you at a level not otherwise possible.

Please enjoy using your free Staffpoint™ Personnel access panel.

The Personnel Panel Interface

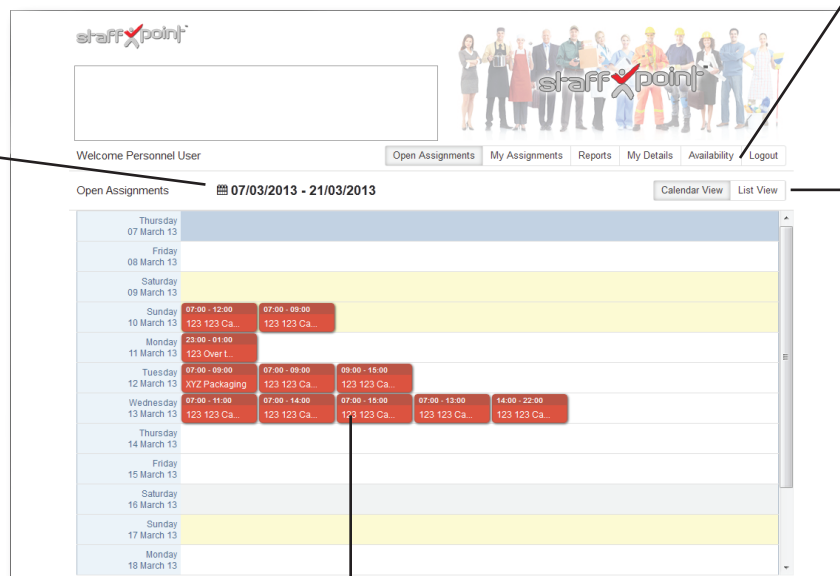
To log in, simply choose 'Personnel' from the dropdown box and enter your login credentials. After logging in as shown below, you'll see the Open Assignments page, which is the Personnel Panel's default view, depending on your version. Otherwise, the default page is the 'My Assignments' page, which you can read about on page 11.



The login form features the staffpoint logo on the left. On the right, there is a section titled 'I am a:' with a dropdown menu set to 'Personnel'. Below this are fields for 'Username:' and 'Password:', followed by a 'Login' button.

The Open Assignments page is where personnel members can view all of the open assignments available for them to request. Each page includes the menu bar, which leads to all the other available sections of the Personnel Panel. (optional)

Date Picker
Use this to navigate quickly around the open assignments calendar.



Menu bar
The way to navigate around the Personnel interface

Views
Switch between the default Calendar View, or the more-detailed List View.

Open Assignment Overview
Similar to the Assignment Overview in the HRM, this is where you can see all of the available assignments at a glance.

The Date Picker



Click the calendar icon to bring up the mini-calendar. From here, you can pick a date or range of dates to show open assignments for.

Clicking on either set of arrows to the left or right of the month name will flip the calendar forward or backwards a month, allowing you to view scheduling history, or plan for the future.

The Menu bar

The Menu bar allows you to move between the Personnel Panel's sections, including:



Open Assignments - (optional) This section shows all of the open assignments that are available for you, as a personnel member, to request to work.

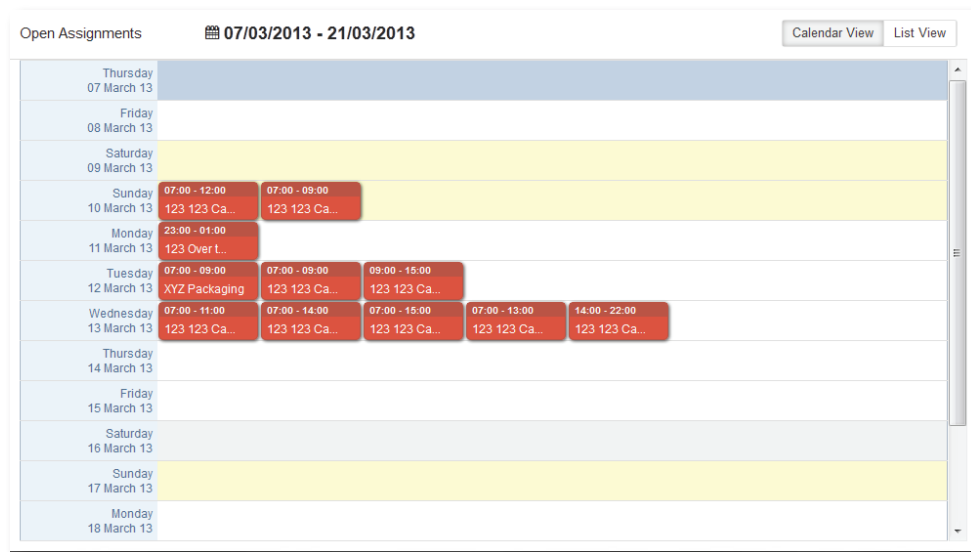
My Assignments - The My Assignments page shows you which assignments you're confirmed to be working, as well as any requests you've placed for assignments which have yet to be confirmed.

Reports - You can view a report which details assignment info, hours worked, where you worked them and more.

My Details - In this section, you can make changes to certain personal details, such as contact info, your account password, and which departments you're allowed to work in.

Availability -Utilizing an easy-to-use interface, you can set your availability schedule, and the system does all the work for you.

The Assignment Calendar



The Assignment Calendar is where all the most important information is displayed. All assignments are shown in chronological order, from start to end of day, and are colour-coded red to show that they're un-filled. Each **Shift Tag** shows important information:

07:00 - 13:00

Emergency

Assignment Duration
The start and end time of the assignment

Assignment Location
A full name or abbreviation code designating the client/location where the assignment will take place.

Terminology

Some of the terminology used in this manual is as follows:

Assignment	- This represents a single continuous period of work. AKA a assignment.
Personnel	- AKA 'staff', the RNs, forklift drivers, cashiers, etc... employed by the agency to work assignments.
Administrator	- Scheduling or other administrative personnel employed by your agency to manage the personnel.
Client	- A hospital, franchisee, warehouse or other location that you provide staffing for.
Location	- A sub-location (if applicable) in a client's system for which staffing requests will be sent.
Missed assignment	- An assignment for which a personnel member was unable to be found, and therefore went unfilled.

Chapter 2

Using the Staffpoint™ Personnel Panel

Overview

The cornerstone of the entire Staffpoint™ system is the ability to book and fill assignment requests online, in real time.

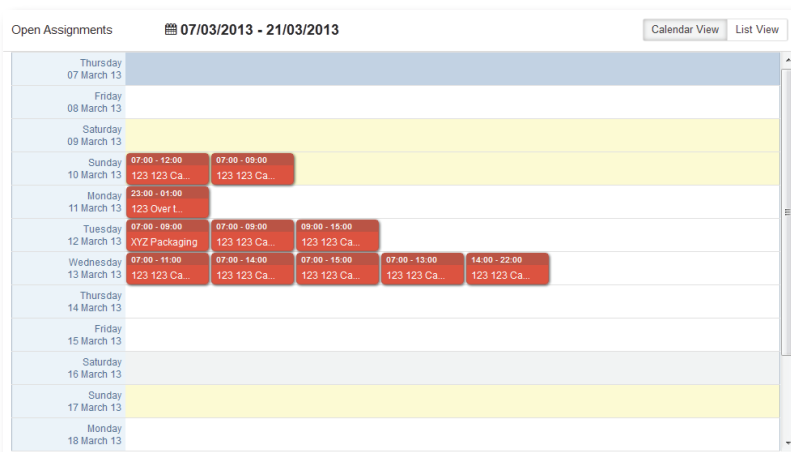
In this chapter, you'll learn how to view and request or self-book open assignments, generate reports, set your availability, and more.

Viewing and requesting/booking available assignments

The first step in using Staffpoint™ is being able to book new assignments to be filled. Before you can find an open assignment to request, someone must have created one or more. (please note that this feature may or may not be enabled. Talk to your administrator for more info.)

Requesting or booking an assignment is easy. To begin, first open up your Personnel panel and log in - the first thing you'll see is the Open Assignments page.

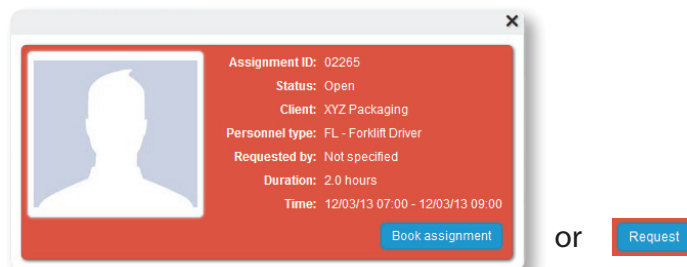
Open Assignments page



Note the red shift tags - these are assignments that you're qualified to request or book.

1. Click a shift tag, it will show you more info about the assignment. You can request/book any time in advance - as long as you can see it, you can request or book it. Use the calendar icon the bring up the date picker and choose the date you'd prefer.

Assignment Details

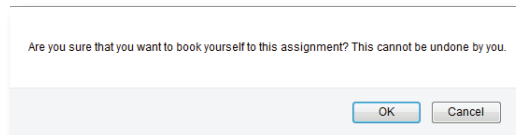


or

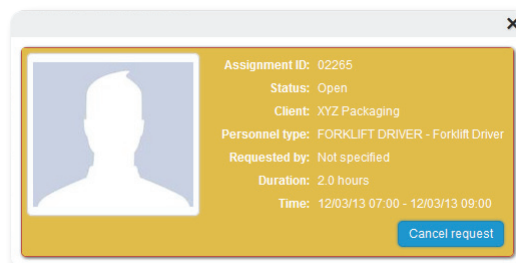


- 2a. When you've decided which assignment you want to work, click on the 'Book assignment' within the shift details. In the case of booking yourself, this will bring up a confirmation dialog.

Assignment request Confirmation



3. If you're sure you want to work this assignment, click the 'OK' button, otherwise click the 'Cancel' button to back out. This will bring up an alert confirming your request, and the shift tag will disappear from the calendar.
- 2b. If your version only allows you to request but not book, click the 'Request' button. This will turn the assignment yellow with no confirmation, so show that you've requested to work it.



4. And you're done!

Google Maps links



5. You can view assignments which you're confirmed to work on the My Assignments page. Assignments that you've booked yourself to cannot be cancelled by you (you'll have to call your agency/office and get them to do that), but you can cancel any requests you've made before you're actually booked to them.
6. Finally, if you're not quite sure how to get to the location of the assignment, you can click on any location or address field in your assignment list to view a Google map showing the directions from your home (or whatever address you use in your profile) to the site of the assignment.

My Assignments

The My Assignments page will show all of your current assignments, sorted from farthest in the future to closest to today. This is also the default sign in page if your version of Staffpoint doesn't include assignment request or booking features.

My Assignments

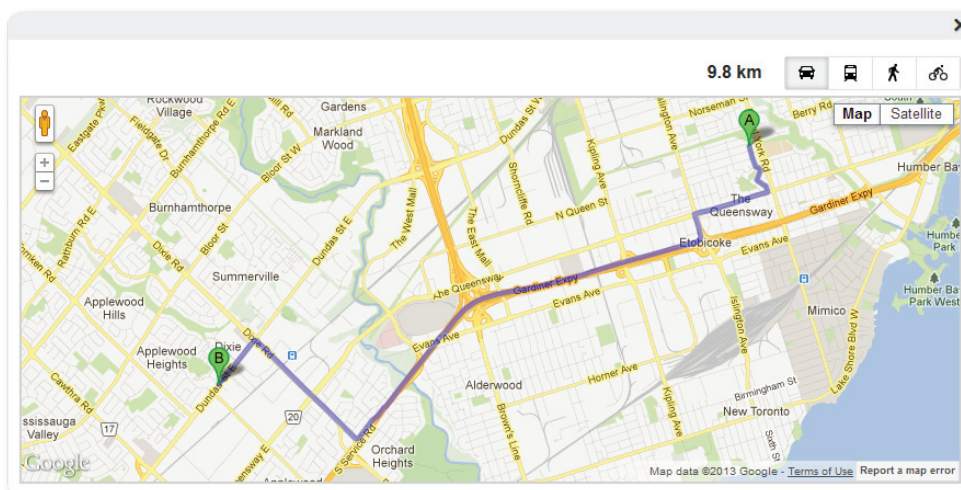
Export Excel

Id	Personnel type	Location	Distance	Address	Date from	Date to	Duration	Notes	Status
2309	FORKLIFT DRIVER - Forklift Driver	XYZ Packaging	~ 7.36 km	2022 palstan rd m8z3m2, Mississauga	28/05/2013 07:00	28/05/2013 09:00	2.0 hrs		
2308	FORKLIFT DRIVER - Forklift Driver	XYZ Packaging	~ 7.36 km	2022 palstan rd m8z3m2, Mississauga	27/05/2013 07:00	27/05/2013 09:00	2.0 hrs		
2307	FORKLIFT DRIVER - Forklift Driver	XYZ Packaging	~ 7.36 km	2022 palstan rd m8z3m2, Mississauga	25/05/2013 07:00	25/05/2013 09:00	2.0 hrs		
2306	FORKLIFT DRIVER - Forklift Driver	XYZ Packaging	~ 7.36 km	2022 palstan rd m8z3m2, Mississauga	24/05/2013 07:00	24/05/2013 09:00	2.0 hrs		
2305	FORKLIFT DRIVER - Forklift Driver	XYZ Packaging	~ 7.36 km	2022 palstan rd m8z3m2, Mississauga	21/05/2013 07:00	21/05/2013 09:00	2.0 hrs		

My Assignments page

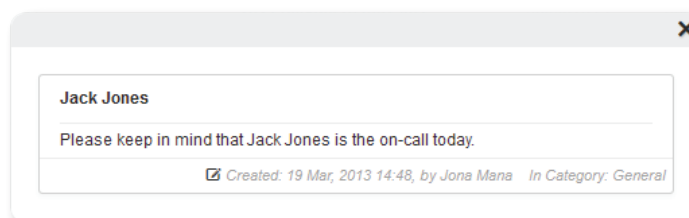
From this page you can see a listing of all of your upcoming assignments. Details include: personnel type required, the client or location, how far it is from you, the address of the location, and the start/end times, and duration.

- A) If you click on the distance of address, a Google map will pop up which will show you the route from your location to the job site. This can be printed out.



My Assignments page

- B) Clicking on a Notes (📝) icon will show you any notes that apply to that shift.



My Assignments page

- C) Lastly, you can export this list to an MS Excel file by clicking the 'Export Excel' button.

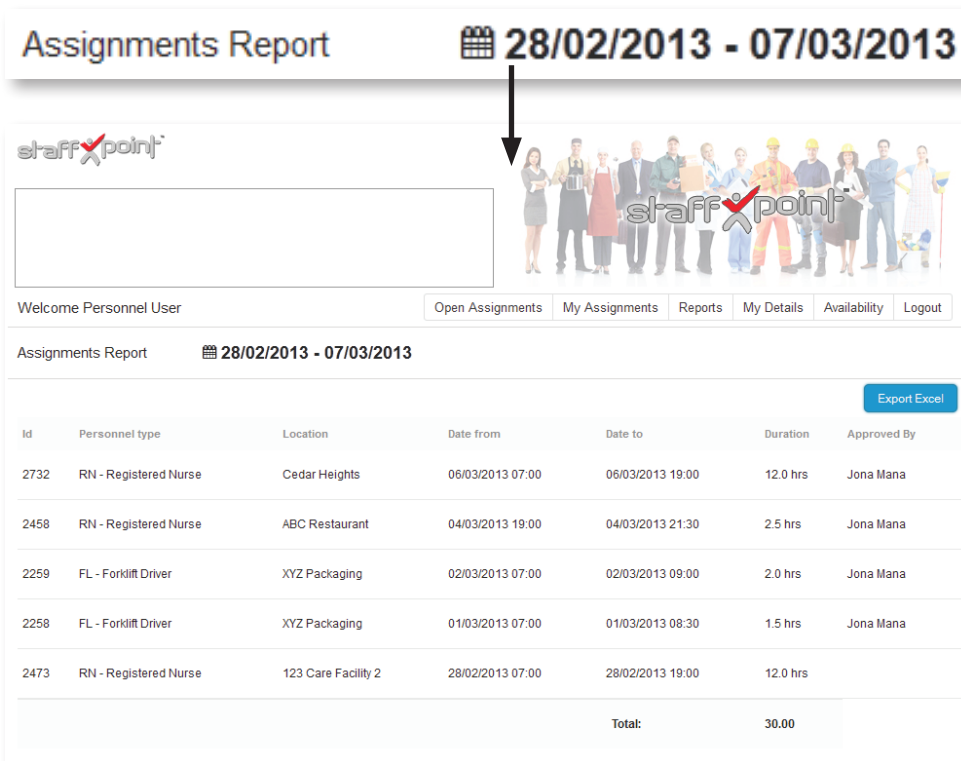
Reports

Reporting is a valuable tool for you to keep tabs on your assignments, hours, and more, and Staffpoint™ provides this.



To access Staffpoint™'s Reports section, just click on the 'Reports' item in the Menu Bar.

1. By default, the report will show the week ending today, but you can change the date range that the report shows by clicking on the calendar icon.



The screenshot shows the 'Assignments Report' page. At the top, there's a header with the title 'Assignments Report' and a date range '28/02/2013 - 07/03/2013' next to a calendar icon. Below this is a banner image with the Staffpoint logo and a group of diverse people. A black arrow points from the calendar icon in the header to the banner image. Below the banner is a 'Welcome Personnel User' message and a secondary menu bar with the same items as the first one, with 'Reports' highlighted. Below the menu bar is the main report area, which includes the title 'Assignments Report', the date range '28/02/2013 - 07/03/2013', and an 'Export Excel' button. The report is presented as a table with columns for Id, Personnel type, Location, Date from, Date to, Duration, and Approved By. The table contains five rows of assignment data and a final row for the total duration.

Id	Personnel type	Location	Date from	Date to	Duration	Approved By
2732	RN - Registered Nurse	Cedar Heights	06/03/2013 07:00	06/03/2013 19:00	12.0 hrs	Jona Mana
2458	RN - Registered Nurse	ABC Restaurant	04/03/2013 19:00	04/03/2013 21:30	2.5 hrs	Jona Mana
2259	FL - Forklift Driver	XYZ Packaging	02/03/2013 07:00	02/03/2013 09:00	2.0 hrs	Jona Mana
2258	FL - Forklift Driver	XYZ Packaging	01/03/2013 07:00	01/03/2013 08:30	1.5 hrs	Jona Mana
2473	RN - Registered Nurse	123 Care Facility 2	28/02/2013 07:00	28/02/2013 19:00	12.0 hrs	
Total:					30.00	

The Reports Page

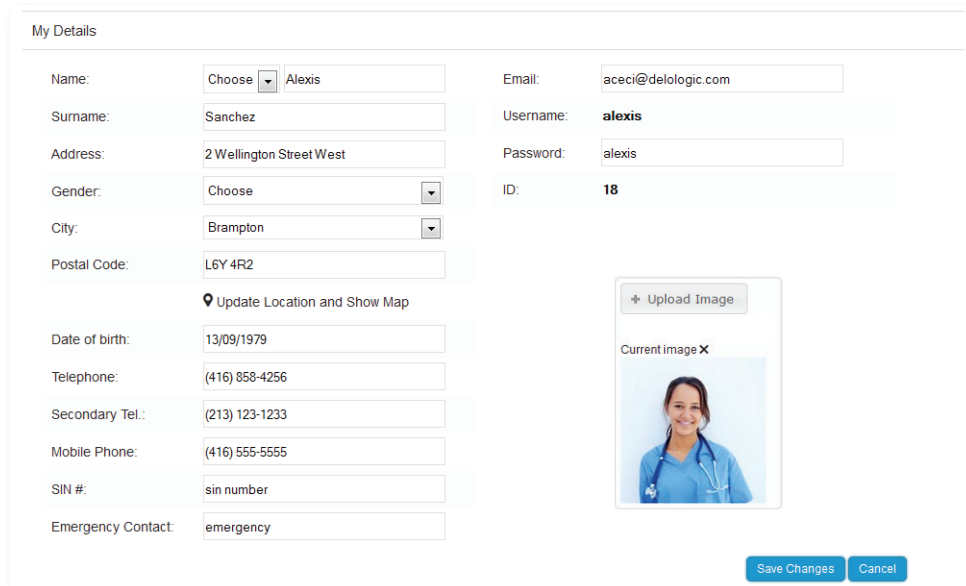
2. You'll see all of the assignments you've worked within that time span, showing their time and date, duration, where it was worked, and who approved the assignment. The report can be exported as an excel file for your own use.

My Details

The My Details page allows you to modify certain aspects of your personnel profile, such as contact info, your password, and what locations you're able to work in.

1. Click on the 'My Details' link on the menu bar. This will open up the My Details page, where you can see your profile's info.

The My Details window



The screenshot shows the 'My Details' form with the following fields and values:

Field	Value
Name:	Choose Alexis
Surname:	Sanchez
Address:	2 Wellington Street West
Gender:	Choose
City:	Brampton
Postal Code:	L6Y 4R2
Update Location and Show Map	
Date of birth:	13/09/1979
Telephone:	(416) 858-4256
Secondary Tel.:	(213) 123-1233
Mobile Phone:	(416) 555-5555
SIN #:	sin number
Emergency Contact:	emergency
Email:	aceci@delologic.com
Username:	alexis
Password:	alexis
ID:	18

On the right side, there is an 'Upload Image' button and a 'Current image' section showing a photo of a female healthcare worker. At the bottom right, there are 'Save Changes' and 'Cancel' buttons.

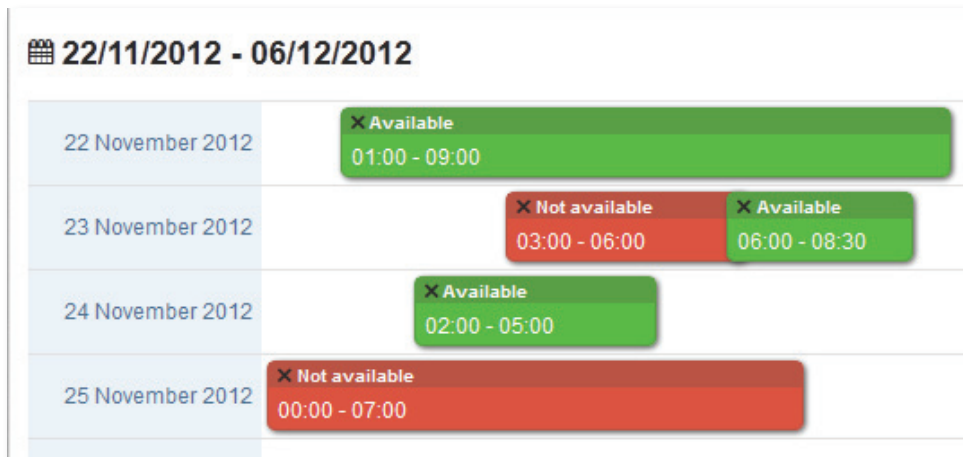
2. Edit any info you feel like. For example if you've moved, you can change your address, city, and postal code to reflect your new contact info.
3. You can also change your email address and password if you choose.
4. Click the 'Update My Details' button to save your changes, or navigate to any other part of the Personnel panel to discard your changes.

You can't change your username or staff ID. These are limited to administrative discretion and for staffing needs.

Availability

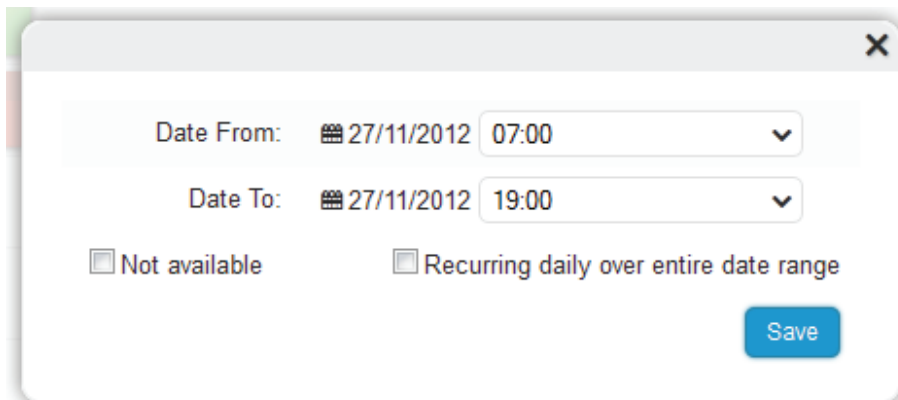
To set your schedule of availability, click on the 'My availability schedule' link in the menu bar. This will open the Availability Chart to the Shortcut View.

1. The default display is of the two weeks beginning on the current day. You can change the days that are displayed by clicking on the calendar picker in the upper left corner.



Availability calendar

2. To set availability, click anywhere in the grid. The days of the month are along the side (each row is a day). By default, the day row you've clicked in will be the start/end day of the availability time you're setting.



Date From: 27/11/2012 07:00
 Date To: 27/11/2012 19:00
☐ Not available ☐ Recurring daily over entire date range
 Save

Shortcut View

3. Pick a date (or leave it as default) and a time range you want to set for this.

There are three types of availability that the system recognizes: 'Available' (green), 'Not Available' (red), and 'Not Set' (blank). The former two are self-explanatory, but 'Not Set' is basically a default for any time that one of the two explicit states aren't set.

The system uses this availability data to determine (along with many other variables) the best person for the job, when booking assignments.

Straight vs Recurring availability.

27 November 2012	<input checked="" type="checkbox"/> Available 07:00 - 23:59
28 November 2012	<input checked="" type="checkbox"/> Available 00:00 - 23:59
29 November 2012	<input checked="" type="checkbox"/> Available 00:00 - 19:00

01 December 2012	<input checked="" type="checkbox"/> Available 07:00 - 19:00
02 December 2012	<input checked="" type="checkbox"/> Available 07:00 - 19:00
03 December 2012	<input checked="" type="checkbox"/> Available 07:00 - 19:00

- If you know that this period of availability will repeat over a number of days, fill the 'Recurring daily...' checkbox. This will repeat the availability period, rather than running it for the whole time specified. You can also specify which days to recur on.

Recurring availability might be useful for someone who is regularly available or unavailable, while a long swath might be useful for someone who is on vacation.

- When you're done, all you have to do is close the tab or window - all changes you make are saved in real-time.

Chapter 3

Using the Staffpoint™ Calling Service

Overview

One of Staffpoint's most exciting features is the calling system which allows you to receive voice call notifications of new assignments, and call in to see if there are open shifts you can request to work, or to get a quick reminder of where you're working next.

(please note that these features may or may not be enabled. Talk to your administrator for more info.)

New assignment notifications

This part of the system requires no work on your part.

When a new assignment is created, the system may call you. When it does so, it will present to you to option to either: 1) accept the assignment, in which case you'll be booked to work it as usual, 2) decline the assignment, in which case you'll be removed from eligibility to work it, or 3) if the assignment has special qualifications requirements, you may choose to hear what those are before accepting or declining.

When you've made your decision, the system will hang up and you're done! Any changes, such as if you need to back out due to illness, etc... will need to be communicated to your agency directly.

Calling in

Using the phone number and Staff ID provided by your agency or administrator, you can call in to Staffpoint's call service in order to deal with assignments proactively.

You can do one of two things currently:

1. Hear a list of the next three open shifts you're eligible to work, and request to be assigned to one of them. In this case, your request is up to the administrators at your agency - you may or may not actually get assigned. This can give you a leg up on everyone else, showing that you're not just sitting, waiting for work.

2. Hear a list of the next three assignments you're booked to work, and their location and other info. In case you've forgotten something you need to know to work or get to them.

The system will track everything, as normal, based on your interaction with it - hours worked, any overtime, declined shifts, and more. You don't need to worry that anything will work differently from how you're used to, just that this can make finding work quicker and easier!

Going Further

Congratulations, you've gotten to the end of the Staffpoint™ Personnel panel manual. Now that you're familiar with its basic tools and features you can start working more assignments, more easily, and more effectively.

Reading through, you've learned to request or book your own assignments, set your schedule, and more.

Staffpoint™ offers advanced tools for staffing and personnel management, but it's always getting better. Look forward to even more tools and functionality to come from Staffpoint™, and we're sure that as you use it, you may even find ways of doing things that are even more efficient than we've tried to explain in this manual.